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MUSIC USA 89

The American Music Conference's 1989 Statistical Review of the U.S. Music Industry with Highlights of a New Teenagers' Attitudes Toward Music-Making and Music Education Survey

THE AMERICAN MUSIC CONFERENCE

What is AMC?

The American Music Conference, a national nonprofit educational association, was founded in 1947 to encourage active amateur music-making and music education for people of all ages. Members include major musical instrument manufacturers, retailers, wholesalers, music industry and music education associations, educational institutions, individuals, and others.

AMC's ten-fold mission is to:

- Educate the general public about the benefits of music in education, recreation and cultural activities.
- Encourage the support, continuation and improvement of the standards of music education in schools.
- Increase appreciation of the value of music in the home, as an avocation and as a character-building activity for youngsters.
- Encourage adult instrumental and choral participation.
- Further interest in and attendance at professional entertainment and cultural performances.
- Promote the use of music in industry and therapy.
- Advise and counsel governmental agencies that may engage in the support of community and other musical activities.
- Give recognition to personal effort, distinguished service and leadership in developing musical activities.
- Acquire and disseminate information, undertake studies and surveys, produce publications and publicity, sponsor competitions.
- Cooperate with and support other organizations in the development and advancement of music and musical activities.

What Does AMC Do?

As the public relations and research arm of the entire U.S. music industry, AMC's ongoing programs in support of its mission include:

Consumer Publicity

Publicizing the benefits of music-making and music education with a variety of messages that reach millions of Americans each year through stories carried by national wire services and newspapers, television and radio broadcasts, cable television programs, consumer magazines, industry and music educator trade publications and other print media.

Statistical Reporting

Collecting and disseminating statistical information through MUSIC USA, the music industry's only ongoing annual review of domestic and foreign manufacturers' shipments (at retail value) of traditional and electronic instruments, printed music and accessories.

Consumer Research

Conducting national consumer research into American's attitudes toward music-making and music education and trends in musical instrument usage.

Music Family Award

Encouraging and recognizing family togetherness and music-making in the home and community with the annual AMC "Amateur Music Family of the Year" award.

Information Source

Serving as the source which governmental agencies, educators, news media, financial analysts, advertising agencies and the public rely on for information about music-making and the music industry.

Who Does AMC Represent?

AMC represents all members of the music industry and music educator communities in the U.S.; it does not promote individual companies, products or people within the industry.

Who Supports AMC?

AMC is supported by the contributions of its members which include instrument and accessory manufacturers, retailers, wholesalers, distributors, publishers, suppliers, trade magazines, and other industry and music educator associations. Contributions are also accepted from music educators, musicians and other individuals who wish to help support the association's programs.

AMC Member Services

In addition to helping AMC spread positive, encouraging messages about music-making and education to America's general public, your contribution entitles you to:

- Six newsletters a year informing you about AMC's publicity results, award programs, research activities and other special projects.
- MUSIC USA, our annual statistical review which reports on manufacturer shipments at retail value in 14 different categories of instruments, printed music and accessories.
- Full written reports on new AMC-sponsored consumer attitude and usage research surveys available at special member rates.

How to Become an AMC Member

For a very small investment in AMC, you will be helping support a wide range of activities which will return that investment many times over.

For more information about AMC membership and recommended contributions, please contact Paul Bjorneberg, Director of Administrative Services, American Music Conference, 303 E. Wacker Drive, Suite 1214, Chicago, IL 60601, or call (312) 856-8820.

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FROM THE PRESIDENT

The overall mission of the American Music Conference is to encourage active amateur music-making by people of all ages and from all walks of life, and, to support individual music teachers and school music education programs.

To meet those goals, our association's programs revolve around two major areas of focus.

The first is implementing a variety of ongoing publicity programs to educate Americans about the important role music can play in their lives. A particularly successful and satisfying project in this area during the past year has been AMC's new brochure for parents, *Music and Your Child: The Importance of Music to Children's Development.* At the time of this writing—just eight months after the brochure's debut was made possible by funding from the National Association of Music Merchants (NAMM)—more than 200,000 copies have been ordered by parents, music retailers, educators, commercial members and others. Requests have come from all fifty states, many Canadian provences and several foreign countries, including The Netherlands, Israel, the Phillipines, Australia and the U.S.S.R.

The second vitally important area of AMC's ongoing mission involves research projects, such as the new Teenagers' Attitudes Toward Music-Making and Music Education survey highlighted in this issue of *Music USA*. This nationwide survey of 12-to 19-year-olds provides the U.S. music community with another link for understanding the perceptions people have about playing their own music; both the benefits and barriers. And, the results of this latest survey, together with our previous two surveys of young adults (age 18-35) and adults (35+), give us a broader, more in-depth look at the "process" music-makers (or non-music makers) go through when deciding to stay with, drop out of, or never start to play an instrument. Taken together, this information gives all of us—commercial members, music educators and other music-related associations—the opportunity to be proactive, rather than reactive, to the wishes and needs of music-makers.

The response to the AMC parents' brochure, the many school music programs around the country that are healthy and growing and the positive attitudes about music expressed by our survey respondents illustrates that many Americans *do* want music in their lives.

However, we must not lose sight of the fact that there *are* parents who do not recognize the merits of music for children; that there *are* school music programs going out of existence; that there *are* negative attitudes toward music-making.

This should serve to remind us that we, as an industry, must not only vigorously continue to provide parents, teenagers and adults of all ages who are "music boosters" with information they need to make educated decisions, but that we must work even more vigorously to break down negative and apathetic barriers that keep the joy of music-making out of peoples' lives.

And, our industry organizations must work together as partners to provide a united voice and front on behalf of music education and participation. In recent years, AMC and several other associations have started to work together to strengthen their networking opportunities. These efforts, to date, have been very successful, however there is much more work that can and must be done in this area.

Our goals as individuals, companies and an industry can only be successful through the support of and involvement with the missions of AMC and every other music-related association in this country.

As a volunteer organization, the success of AMC depends on its members. I would like to thank the many, many people who provide not only financial support, by give so willingly of their time and talents by serving on our board of directors, our committees and by offering their insights and expertise to our various programs to ensure the future of music in America. And finally, on behalf of the American Music Conference, a special note of thanks to NAMM for its support of this publication and the music industry members who helped develop the teen attitude survey.

Karl Bruhn

HOW TO READ THE DATA

All units and dollars in this annual review are based on shipments by manufacturers at estimated retail value. Imports, and in some cases exports, are included where noted.

To provide an indicator of actual sales at the music retailer level, this review also includes the results of the National Association of Music Merchants' (NAMM) ongoing survey of music stores around the country.

The total 1988 sales figure of $3.716 billion represents in large part manufacturers' shipments sold through music stores. However, in the past several years, the numbers of different outlets selling musical instruments have increased, particularly with the popularity of electronics. Therefore, in categories where it is appropriate, dollar figures also include estimated sales through mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers by manufacturers, publishers or distributors.

It should be noted that retail dollar estimates in this report are based on shipments to retailers which may or may not have been sold to consumers each year. The sources of these figures vary widely depending on the availability of a reporting mechanism, the nature of the mix of U.S. made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S Customs Department. In all cases these statistics reflect U.S. Tariff Commission figures as they appear on the import page of this report.

Only two categories in this review are based on organized but voluntary reporting systems, and even within these categories (pianos and organs) estimates have been made for manufacturers who do not report their shipments. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, continues to be a particular challenge.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry using as a baseline a 1987 survey by the National Music Publishers Association.

Wind instruments, percussion and string data have been analyzed by industry experts who have tracked both domestic manufacture and imports.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed string instruments. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

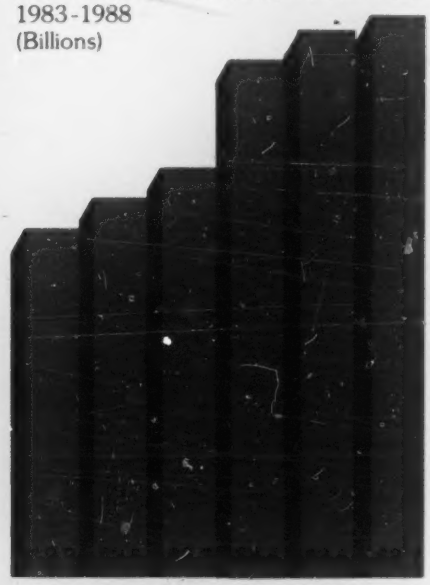
Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1983, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents several months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

1988 RETAIL VALUE OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND MUSICAL ACCESSORIES UP 1 PERCENT TO $3.7 BILLION

MUSIC INDUSTRY RETAIL DOLLARS
1983-1988
(Billions)

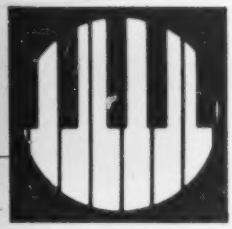


	Music Industry Retail Value	Personal Consumption	% of Personal Consumption[3]	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1988	$3,716,140,000	$3,227.5	0.115%	$4,864.3	354.3
1987	3,677,747,000	3,012.1[6]	0.122%	4,526.7[7]	340.4
1986	3,344,957,000[5]	2,762.5	0.121%	4,206.1	328.4
1985	2,697,900,000	2,582.1	0.104%	3,989.1	322.2
1984	2,496,333,000	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1959	490,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	438,000,000	281.4	0.156%	441.1	84.3
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1949	220,000,000	176.8	0.124%	256.5	71.4
1941	90,000,000	80.6	0.111%	124.5	44.1

1. For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music sales. Includes a new category – synthesizers.
2. Includes a new category – electric pianos.
3. To be read as a fraction of 1%.
4. Includes a new category – portable keyboards – plus revised estimates for several categories.
5. Figure adjusted to reflect final printed music data from survey results not available at 1986 press time.
6. & 7. Figures adjusted to reflect U.S. Commerce Department revisions made in Personal Consumption and Gross National Product after 1988 publication of Music USA.

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

STATISTICAL INFORMATION



Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

During 1988, acoustic piano units were down 7 percent; total dollars were flat. Imported verticals were down 19 percent in units compared to 1987. Verticals, combined, decreased 10 percent in units and 6 percent in dollars. Grand piano units were up 1 percent and 6 percent in total dollars. According to industry sources, grands accounted for more than half of all dollars in this category.

Pianos

	Units	Dollars[1]
1988	162,861	$683,616
1987	174,993	682,725
1986	166,555	619,763
1985	151,300	480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1974	248,405	273,246
1973	247,701	239,179
1972	232,507	208,924
1970	193,814	164,000
1965	245,600	189,000
1960	198,200	148,650
1950	172,531	125,000
1940	138,332	95,000

[1]*In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.

Organs

Includes: Domestic production and imports with retail value of $1,000 and up. Exports are not included.

During 1987, units dropped 38 percent while dollars were down 28 percent. The average per-unit value rose 8 percent compared to 1987. Industry sources reported stable sales in both low- and higher-priced instruments.

Organs

	Units	Dollars[1]
1988	25,500	$95,162
1987	35,200	121,608
1986	40,000	140,000
1985	49,600	156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1974	233,845	424,896
1973	202,275	358,836
1972	186,000	314,340
1970	137,500	215,400
1965	143,000	180,600
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1]*In thousands of dollars.*
Source: International Association of Electronic Keyboard Manufacturers, U.S. Tariff Commission and industry estimates.

String Instruments

Includes: Imports and domestic production of violins, violas, cellos and basses.

A healthy market for cellos and basses, along with growing school orchestra programs contributed to this category's 12 percent and 5 percent respective unit and dollar increase. Domestically produced stringed instruments rose 9 percent in units and 18 percent in dollars. Shipments from Europe rose 5 percent in units (compared to 1987) while Asian units were up 14 percent.

String Instruments

	Units	Dollars[1]
1988	114,600	$42,097
1987	102,740	40,144
1986	86,950	32,029
1985	70,000	26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1974	63,655	19,466
1973	54,866	15,252
1972	61,565	12,559
1970	75,700	19,720
1965	64,000	13,400
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: U.S. Tariff Commission with adjustment made for domestic production.

Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

Total units for fretted instruments jumped 14 percent and rose more than 25 percent in dollars in 1988. Industry sources reported strong markets for mid- to upper-end acoustic guitars among the young adult (age 25 to 45) audience and younger, first-time buyers of low-end electric guitars. Domestic production increased 14 percent in units and some 32 percent in dollars over 1987. Imported acoustic and electric guitars, combined, increased 17 percent in units and 22 percent in dollars. Imported acoustic units posted a 26 percent increase compared to 1987.

Fretted Instruments

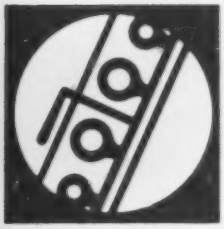
	Units	Dollars[1]
1988	1,422,355	$412,325
1987	1,247,265	328,322
1986	1,121,235	302,033
1985	1,056,152	271,636
1984	994,607	236,000
1983	875,106	214,500
1982	1,213,138	252,805
1981[2]	1,332,550	320,417
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1970[2]	2,214,686	159,810
1965[2]	1,500,000	140,000
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1]In thousands of dollars.
Source: U.S. Tariff Commission and industry estimates.
[2]These years also include estimates of amplifier and P.A. system sales.

Fretted Instruments

	1988		1987		1986	
Domestic	**Units**	**Dollars**	**Units**	**Dollars**	**Units**	**Dollars**
Includes Non-electric guitars, Electric guitars and other fretted inst.[1]						
Domestic Total ($ rounded)	141,000	$118,213,000	123,400	$ 89,279,000	117,470	$ 79,774,000
Imports						
Non-electric guitars	652,419	$107,500,000	517,331	$ 79,570,000	492,764	$ 73,554,000
Electric guitars	485,135	174,460,000	452,852	150,642,000	405,985	136,979,000
Other fretted[2]	143,801	12,152,000	153,682	8,831,092	105,036	11,726,000
Import Total ($ rounded)	1,281,355	$294,112,000	1,123,865	$239,043,100	1,003,785	$222,259,000
Grand Total ($ rounded)	1,422,355	$412,325,000	1,247,265	$328,322,100	1,121,235	$302,033,000

[1]Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.
[2]Includes banjos, ukuleles and mandolins.

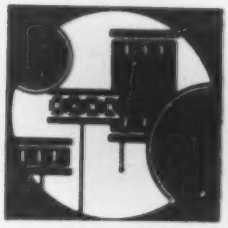


Woodwind Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.

Brass Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.



Percussion

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

Healthy school music programs, more students and more attention to retaining current students, were cited as contributing to increases in both the woodwind and brass categories in 1988.

Woodwind instruments were up slightly more than 2 percent in units and 5 percent in dollars. Brasswinds rose 4 percent in units and 5 percent in dollars. Industry sources reported strong consumer demand for alto and tenor saxophones and trombones.

Strong school band programs and price increases, due in part to the declining value of the U.S. dollar, were factors cited by industry sources as contributing to the 5 percent increase over 1987. Imports, which represent the majority of this category, rose by approximately 7 percent in 1988.

Band Instruments
A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars[1]
1988	354,800	$179,587
1987	348,996	171,035
1986	326,500	158,000
1985	309,800	141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	353,000	85,073
1972	329,207	76,972
1970	304,000	66,150
1965	322,000	61,000
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

[1]*In thousands of dollars. Source: Industry estimates.*

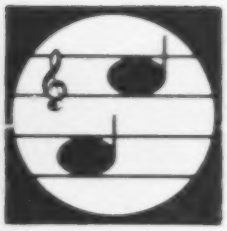
Band Instruments
B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

	Units	Dollars[1]
1988	152,335	$78,132
1987	146,475	74,411
1986	139,500	69,150
1985	144,600	67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1974	267,360	71,118
1973	254,000	63,754
1972	219,800	53,666
1970	225,000	51,000
1965	230,000	44,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

Drums

	Units	Dollars[1]
1988	NA	$105,525
1987	NA	100,500
1986	NA	90,000
1985	NA	83,000
1984	NA	82,000
1983	NA	78,000
1982	NA	78,475
1981	NA	82,914
1980	NA	69,017
1979	NA	70,428
1978	NA	61,240
1977	NA	56,700
1976	NA	53,000
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,856
1970	NA	32,000
1965	NA	50,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: Industry estimates.
Unit figures unavailable since drums sold in sets.



Printed Music

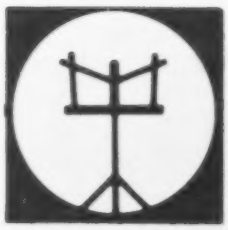
Includes: Domestic publishing of sheet music and self-instruction aids.

A strong market for printed music books (notably in the heavy metal and rock 'n roll areas) and church and school choral compositions contributed to a 7 percent increase in 1988. Industry sources also cited stable school music programs and a growing interest in music-making among adults as reasons for growth.

Printed Music

	Dollars[1]
1988	$330,502
1987	308,880
1986	286,000
1985	275,000
1984	266,800
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1970	91,500
1967	72,000

[1]In thousands of dollars. 1981–1983 data from a new survey sponsored by National Music Publishers' Assoc., Church Music Publishers' Assoc., and Music Publishers' Assoc. of the U.S.
Source: Industry estimates.



Accessories

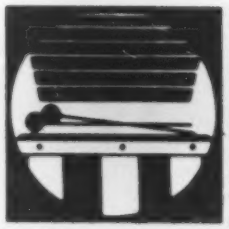
Includes: Estimates for sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

While all segments of this category reported growth during 1988, percussion and miscellaneous guitar accessories showed the largest gains, up 8 and 7 percent, respectively. Guitar strings (which represent the largest total dollar segment) rose 6 percent over 1987.

Accessories

	Dollars[1]
1988	$244,400
1987	230,700
1986	226,000
1985	208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	196,152
1974	183,474
1973	152,895
1972	132,953
1970	108,400
1967	85,000

[1]In thousands of dollars.
Source: Industry estimates
[2]Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.



Miscellaneous Other Instruments

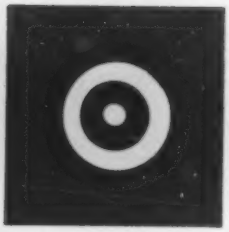
Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Total dollars for this category (including 19 different types of imported instruments) increased 15 percent compared to 1987. Electronic instruments jumped 46% in value and percussion instruments (drums, cymbals and other percussion instruments) were up 7 percent. Combined, electronics and percussion accounted for 71 percent of all dollars in this category, compared to 67 percent in 1987.

Miscellaneous Other Instruments

	Dollars[1]
1988	$345,274
1987	301,214
1986	226,954
1985	211,161
1984	166,000
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,887
1974	106,628
1973	107,072
1972	92,146
1970	78,509
1967	53,800

[1]In thousands of dollars.
Source: U.S. Tariff Commission.
[2]Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.



Music Software

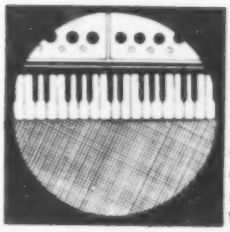
Includes: Domestic production of sequencing, music notation or sound editing and librarian software products that allow for the creation or composition of music for the purpose of performance, recording, or publishing.

Increased realization by adults that music can be made and composed on home computers and growth in the educational market were cited by industry sources as contributing to this category's 25 percent growth in 1988.

Music Software

	Dollars[1]
1988	$25,000
1987	20,000

[1]*In thousands of dollars.*
Source: Industry estimates.



Portable Keyboards

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

While lower-end units in this category dropped slightly and moved up 5 percent in dollars, large declines in both units and dollars at the high-end brought total units and dollars down 13 and 37 percent, respectively. Sources cited a maturing market and expanding distribution outlets (particularly for over $300 units traditionally sold through MI dealers) as contributing factors.

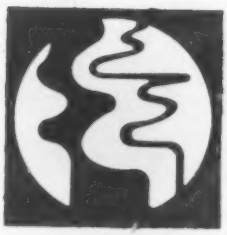
Keyboard units retailing for an average of under $300 were down 2 percent in units while price increases brought dollars up 5 percent.

	Units	Value
Under $300:	4,004,400	$302,527,000
Over $300:	251,000	$ 98,631,000
Total:	4,255,400	$401,158,000

Portable Keyboards

	Units	Dollars[1]
1988	4,255,400	$401,158
1987	4,798,000	548,750
1986	2,500,000	526,500
1985	1,300,500	253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53,900[2]
1980	NA	7,586[3]

[1]*In thousands of dollars.*
[2]*Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.*
[3]*Included in Miscellaneous Other Instruments in 1980.*



Synthesizers

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers.

A softening of the market in 1988 contributed to a 5 percent decline in units; dollars were up 1 percent. Industry sources reported healthy markets among trade-up purchasers of more expensive units and first-time buyers of units in the low-end price brackets. Drum synthesizers accounted for nearly one-third of all units in this category.

Synthesizers

	Units	Dollars[1]
1988	361,800	$303,040
1987	378,500	299,900
1986	350,500	275,000
1985	220,000	173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates*

Electric Pianos/ Electronic Keyboards

Includes: Domestic production, imports and exports.

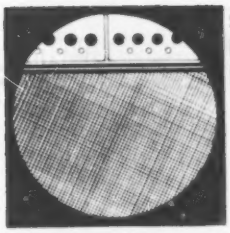
Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

Sound quality and improved action continued to attract more consumers in 1988, according to industry sources, contributing to a 5 percent increase in both units and dollars. Other factors cited included expanded distribution and growing numbers of school music programs and churches utilizing these instruments.

Electric Pianos/ Electronic Keyboards

	Units	Dollars[1]
1988	108,255	$181,868
1987	103,100	173,208
1986	84,000	134,400
1985	60,000	107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates.*



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

According to industry sources, growing consumer interest in playing music and strong demand in both the low-end, first-time buyer and high-end trade up markets brought guitar amplifiers up 6 percent in both units and dollars.

P.A. systems and components also posted a 6 percent dollar increase in 1988. Combined, signal processors and speaker systems (the two largest dollar volume segments) accounted for 38 percent of the category's total dollars.

Amplifiers

	Units	Dollars[1]
1988	212,350	$61,454
1987	200,300	58,250
1986	188,700	55,228
1985	170,000	51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,960	53,592
1972	110,000	43,245
1971[2]	96,000	35,643

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

P.A. Systems and Components
(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Units	Dollars[1]
1988	NA	$227,000
1987	NA	215,100
1986	NA	203,900
1985	NA	192,000
1984	NA	181,000
1983	NA	171,000
1982	NA	157,500
1981	NA	175,000[3]
1980	NA	121,000[4]
1979	NA	121,000
1978	NA	108,000
1977	NA	100,000
1976	NA	60,000
1975	71,000	53,000
1974	60,000	45,000
1973	18,900	11,248
1972	18,000	10,318
1971[2]	16,000	9,903

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*
[3]*Includes $18 million of electronic devices previously included in the "Accessories" category.*
[4]*Low estimate according to industry sources.*

EXPORTS INCREASE THIRD CONSECUTIVE YEAR – UP 30% IN 1988, IMPORT GROWTH SLOWS TO 7% INCREASE

U.S. exports of musical instruments, parts and accessories during 1988 increased for the third consecutive year, growing 30% to an all-time high of nearly $215.3 million, according to AMC's annual interpretive analysis of U.S. Department of Commerce data.

Imports slowed during 1988, with total value reported at $846,841,000, a 7% increase over 1987, compared to a 36% increase between 1986 and '87.

Industry experts attribute the 1988 export growth in large part to the dollar's decline against foreign currencies.

1988 Exports

Acoustic guitars let all export categories with a 103% increase to 29,650 units valued at $8.065 million, up 83%. The United Kingdom received the largest total number of guitars; 6,275 units (up 101% from 1987) valued at $1.5 million.

Acoustic piano exports showed solid gains in 1988, up 24% to nearly 7,000 units and 34% in total value to $9.4 million.

Exports of brasswinds jumped 43% in units to more than 64,000 and 46% in total value to $19.7 million. Combined, 47% of this category's total units were shipped to West Germany, the United Kingdom and Japan. Increases of 24% in units (to 52,100) and 45% in value (to $8.3 million) were reported for woodwind instruments. Canada was the leading importer of American-made woodwinds. Total value of exported percussion instruments was down some 44% to $12.1 million, due in large part to a major drop in value of shipments to Japan.

1988 U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1988 Units	1988 Value	1987 Units	1987 Value	1986 Units	1986 Value	1988 Leading Sources
Pianos	82,609	$151,231,000	81,535	$141,822,640	70,746	$116,446,770	Japan/Korea
Violins, Violas, Cellos, Basses	110,043	7,852,000	100,402	7,575,312	87,423	6,027,529	West Germany/China
Guitars, Nonamplified	652,419	26,875,000	517,331	19,892,423	492,764	18,388,482	Korea/Taiwan/Japan
Other Stringed Musical Instruments[1]	143,801	3,038,000	153,682	2,207,773	105,036	2,931,464	Korea/Taiwan
Strings for Musical Instruments	N/A	3,885,000	N/A	4,122,715	N/A	3,472,327	West Germany/ United Kingdom
Pipe Organs	156	9,582,000	104	8,100,449	135	6,915,917	United Kingdom/Canada
Organs (Except Pipe & Electric)[2]	33,744	1,649,000	12,448	10,657,500	65,332	1,850,465	Italy/Japan
Accordions, Concertinas	8,121	1,497,000	3,709	1,069,949	7,434	1,509,815	Italy/West Germany
Mouth Organs[3]	175,881	5,064,000	251,107	3,461,789	179,011	3,683,776	West Germany
Brasswind Musical Instruments[4]	32,321	10,784,000	32,028	9,076,579	27,360	7,927,273	Japan/West Germany
Clarinets	19,928	4,006,000	24,585	5,902,151	20,606	4,055,033	France/Japan
Saxophones	32,145	12,615,000	27,999	9,106,394	24,668	7,209,563	Japan/Taiwan
Other Wind Instruments[5]	1,283,721	7,336,000	976,486	7,048,996	870,319	5,754,275	Japan/Taiwan
Percussion Musical Instruments[6]	N/A	30,898,000	N/A	28,890,837	N/A	25,393,613	Taiwan/Canada
Electronic Keyboards[7] (Two Keyboards)	1,002,710	44,206,000	176,990	9,550,800	11,560	4,638,806	Japan/Korea
Electronic Keyboards (One Keyboard)	4,670,385	277,065,000	3,990,715	241,748,788	1,930 390	159,357,868	Japan
Synthesizers (Keyboard Type)	163,785	42,477,000	511,435	63,045,361	261,181	61,734,398	Japan/Hong Kong
Other Electronic Instruments[8]	502,114	33,644,000	792,589	57,630,465	107,170	12,861,602	Japan
Hand Held Electronic Instruments[9]	416,853	6,659,000	292,957	5,268,457	40,132	1,208,322	China(M)
Electronic Fretted Instruments	485,135	43,615,000	462,852	37,660,460	405,965	34,244,632	Japan/Korea
Accessories[10]	N/A	36,549,000	N/A	36,311,120	N/A	30,584,815	Japan/Taiwan
Musical Instrument Parts	N/A	80,742,000	N/A	73,296,754	N/A	63,046,745	Japan/Mexico/ West Germany
Harpsichords and Clavichords	4,972	5,171,000	7,302	7,576,196	6,876	4,110,855	Korea
TOTALS		$846,841,000		$791,023,908		$583,356,345	

Source: U.S. Department of Commerce, Bureau of Census, Foreign Trade Division. [1]Includes banjos, ukuleles and other fretted instruments. [2]1987 figures adjusted by AMC to more accurately reflect imports. Original U.S. Department of Commerce statistics: 58,124 units at $2,357,953. [3]All totals are in dozens. [4]Over $10 in value. [5]Includes flutes, oboes, English horns, etc. [6]Includes cymbals, drums, marimbas, triangles, etc. [7]1987 unit and value figures adjusted by AMC. These figures may still include a variety of different electronic instruments. Original U.S. Department of Commerce statistics: 135,013 units at $17,869,692. [8]Includes any instrument requiring amplification; drum and rhythm machines, etc. [9]Original U.S. Department of Commerce statistics. May contain variety of misclassified instruments. [10]Includes mutes, accessories for drums and cymbals, lyres, music stands, instrument cases, metronomes, pitch pipes, tuning forks and tuning hammers.

The Other Plucked and Bowed Strings category (including harps, clavichords and mandolins) rose 9% in value, but was down 35% in units.

Combined value of all exported electronic instruments rose 32% to $85.9 million in 1988, and accounted for 39% of all U.S. musical instrument exports. Synthesizers/electric pianos jumped 94% in units to nearly 25,400 and 95% in value to $13.32 million. Japan was the leading customer for American-made synthesizers. The United Kingdom was the leading customer for electronic pianos, with shipments at 2,816 units with a total value of $250,000. The Electronic Organ category increased 69% in units (at 6,744) and 26% in value to nearly $8 million. Electric guitars were reported at 33,500 (up 28%), valued at $10.3 million (a 19% increase).

1988 Imports

Electronic keyboards (with one keyboard) remained the leading import category, with reported total dollar value of nearly $277.1 million, a 15% increase over 1987. Of the 4,870,000 units shipped to the U.S., 80% came from Japan with an average unit value of $65 compared to $63 in 1987.

Imported synthesizers (keyboard type) dropped 78% in 1988, to 163,785 units; total value was down 48% to approximately $42.5 million. The plunge was due, in large part, to decreased shipments from Japan and South Korea of units valued at under $100. Hand-electonic instruments rose 42% in units with a total value of $6.9 million.

Electric guitars rose 7% in units with a total value of $43.6 million, a 16% increase. Imported Japanese electric guitars represented 45% of the category's $43.6 million.

Imported acoustic guitars showed solid gains, with South Korea shipping 51% of all units valued at under $100 per-unit and 37% of those valued at or over $100.

Acoustic pianos represented the second largest import category in terms of total value. Imported verticals represented 59% of total units and 34% of total value. Grands rose 7% in units and 9% in value.

With the exception of clarinets, each category of imported band and orchestra instruments reported increases in total units and total value. Saxophones led the group, with a 15% unit increase and 39% increase in total value. Brasswinds were up 1% in units and 19% in value; clarinets dropped 23% in units and 47% in value. Units in the Other Wind Instrument category were up 31% in units and 4% in value. String instruments rose 10% in units and 4% in total value. Percussion, the largest total value dollar category in this group, moved up 7% to nearly $31 million.

1988 U.S. EXPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1988 Units	1988 Value	1987 Units	1987 Value	1986 Units	1986 Value	1988 Leading Customers
Pianos	6,987	$9,387,000	5,642	$6,990,000	3,455	$4,832,603	Canada
Guitars	29,644	8,065,000	14,571	4,417,000	12,764	3,887,866	United Kingdom/Japan
Electric Guitars	33,496	10,312,000	26,145	8,686,000	15,663	4,202,302	Japan/United Kingdom
Other Plucked and Bowed Strings[1]	30,828	4,400,000	41,478	4,037,000	51,255	3,623,425	Japan
Electronic Organs	6,744	7,983,000	3,984	6,332,000	4,878	5,550,991	Canada
Synthesizers and Electric Pianos	25,368	13,322,000	13,059	6,827,000	4,107	3,316,720	Japan/United Kingdom
Other Electronic Musical Instruments	N/A	54,244,000	N/A	42,655,000	N/A	26,886,507	United Kingdom/Japan
Brasswinds	64,319	19,745,000	42,022	13,549,000	30,703	9,800,039	West Germany/Japan
Woodwinds	52,104	8,295,000	42,075	5,709,000	25,920	3,945,339	Canada/United Kingdom
Percussion Instruments	N/A	12,066,000	N/A	17,387,000	N/A	7,696,202	Japan/West Germany
Organs, Pipe & Reed	140	448,000	124	480,000	88	102,668	West Germany
Piano and Organ Parts	N/A	5,925,000	N/A	5,633,000	N/A	4,472,375	Mexico
Other Parts, Cases and Accessories	N/A	59,488,000	N/A	42,291,000	N/A	33,258,117	Japan/West Germany
Other Musical Instruments[2]	32,548	1,586,000	38,279	744,000	22,975	938,329	Japan/Canada
TOTALS		$215,288,000		$165,737,000		$112,513,483	

[1]Includes harps, clavichords, mandolins. [2]Includes mouth organs, accordions.

1988 NAMM RETAILER SURVEY

During 1988, total net sales of musical instruments, sheet music and accessories rose 3.2 percent compared to 1987, as reported by music retailers around the U.S. who participated in the National Association of Music Merchants (NAMM) ongoing survey. Data is analyzed monthly by Industry Insights, Inc., of Columbus, Ohio.

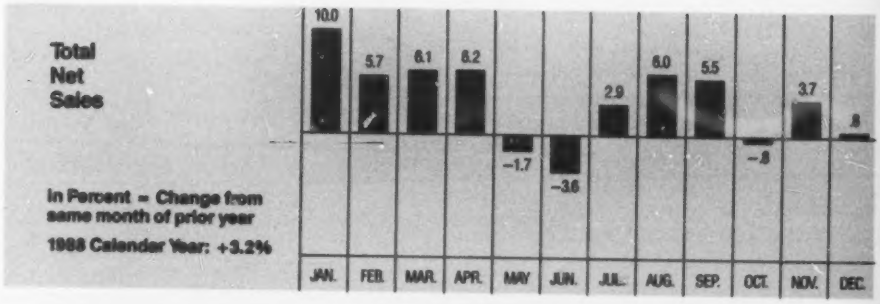
Acoustic piano sales in 1988 rose nearly 2 percent and organs were down more than 5 percent.

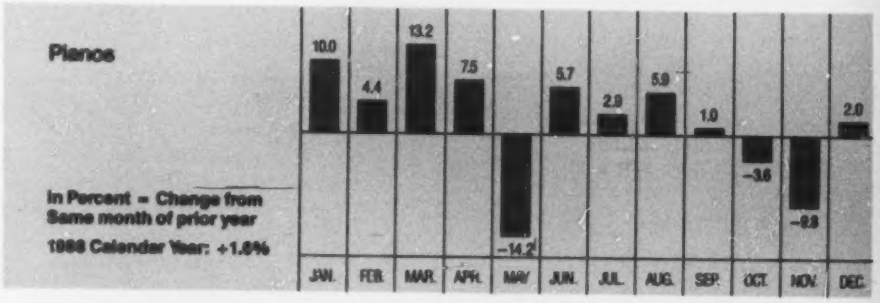
Band and orchestra instruments increased slightly and percussion instruments were up 6.8 percent.

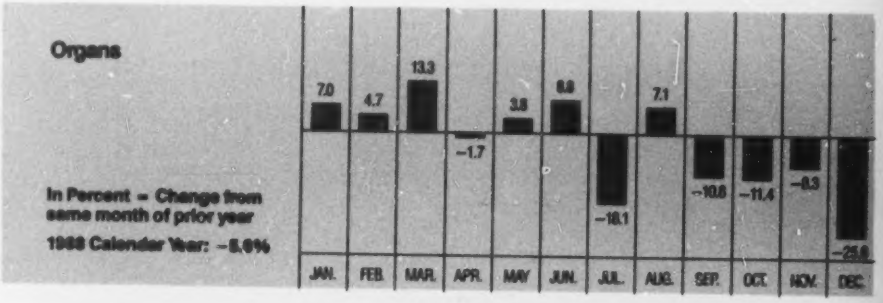
Fretted instruments posted a 7.3 percent sales increase, sound reinforcement equipment gained 4 percent and electronic keyboards were up more than 7 percent.

Instrument amplifiers (guitar, bass and keyboard) increased 12 percent and signal processing and effects devices were up nearly 14.5 percent.

Sheet music gained nearly 8 percent and accessories were up 6 percent.

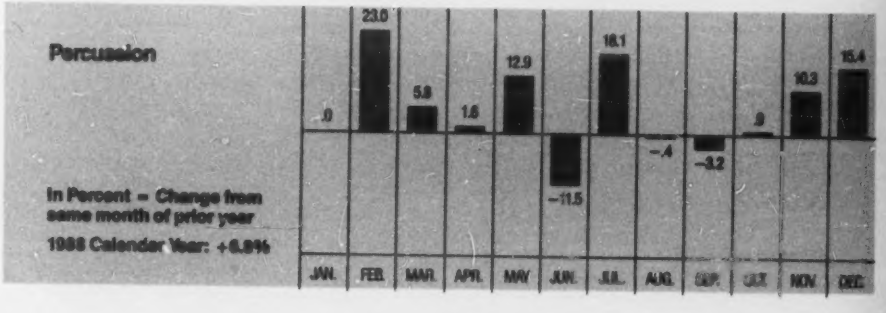






How to Read The Charts: On each of the following charts, 1988 total net sales in each product category are shown as the percentage of change from the same month of the prior year. It should be noted that dollar information has not been adjusted for inflation.

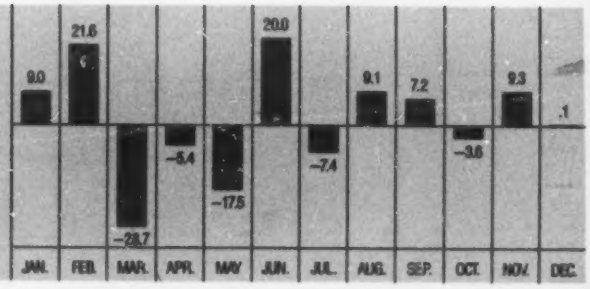
Further information about this music retailer survey is available from The National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008.



Band and Orchestra Instruments

In Percent – Change from same month of prior year

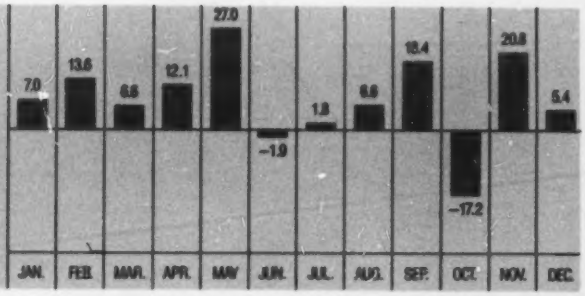
1988 Calendar Year: +0.7%



Fretted Instruments

In Percent – Change from same month of prior year

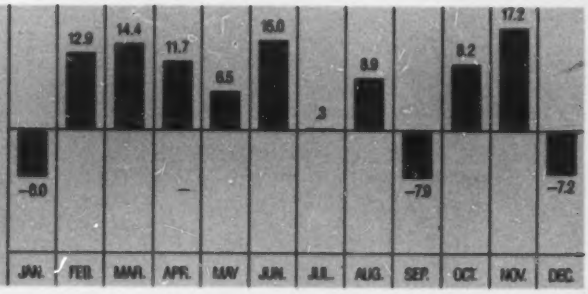
1988 Calendar Year: +7.3%



Sound Reinforcement Equipment

In Percent – Change from same month of prior year

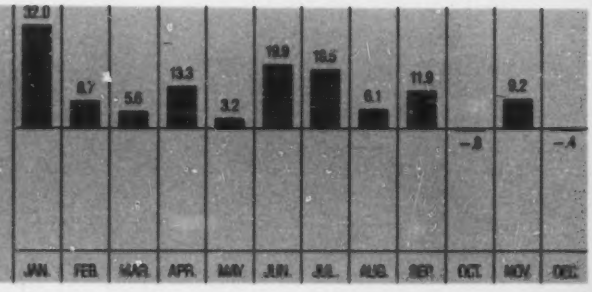
1988 Calendar Year: +4.0%

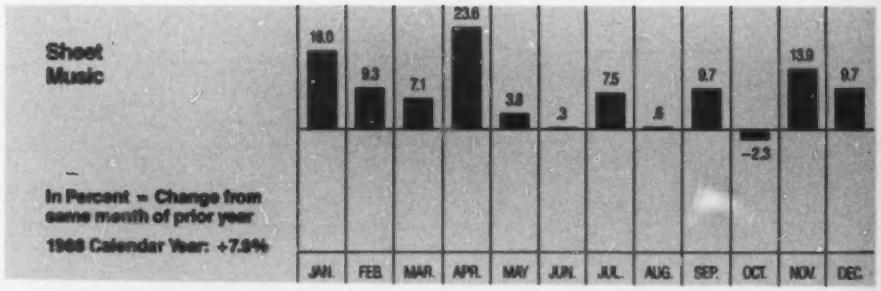


Electronic Keyboards

In Percent – Change from Same month of prior year

1988 Calendar Year: +7.6%




Sheet Music
In Percent = Change from same month of prior year
1988 Calendar Year: +7.8%
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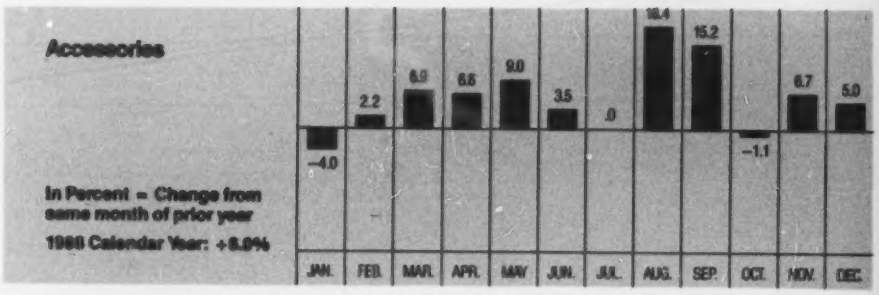
Accessories
In Percent = Change from same month of prior year
1988 Calendar Year: +8.0%
-4.0
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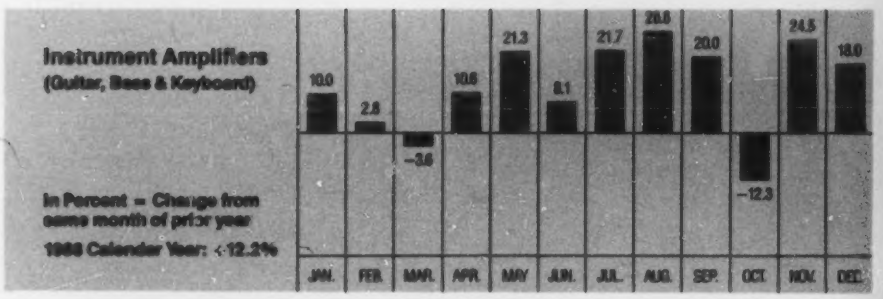
Instrument Amplifiers
(Guitar, Bass & Keyboard)
In Percent = Change from same month of prior year
1988 Calendar Year: +12.2%
10.0
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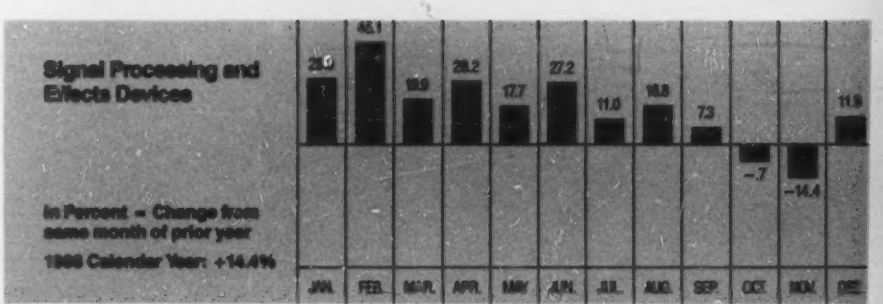
Signal Processing and Effects Devices
In Percent = Change from same month of prior year
1988 Calendar Year: +14.4%
25.0
46.1
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17.7
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AMC SURVEY FINDS SELF-MOTIVATION AND STRONG PERSONAL INTEREST, TOGETHER WITH PARENTAL SUPPORT AND HOME ENVIRONMENT, IMPORTANT FACTORS IN SUSTAINING TEENAGERS' MUSIC INVOLVEMENT

Self-motivation and a strong personal interest in playing a musical instrument, supported by parental encouragement and a musical environment in the home, are important factors in sustaining music involvement by teenagers according to the American Music Conference's new Teen Attitudes Survey.

These insights, and others, into the musical attitudes, backgrounds and practices of teenage musical instrument players and non-players, were revealed in the new survey underwritten by the National Association of Music Merchants (NAMM).

Many variables undoubtedly influence decisions about instrumental music involvement. However, as was found in a previous AMC survey of young adults age 18 to 35, musical background and learning experience are important areas of difference among current, past and non-playing teens.

Family Involvement

Family or household members appear to strongly influence teens musical involvement. Among teens who currently play musical instruments, 63% responding to the survey report someone else in the household plays, while someone else in households of only 42% and 29% of past and non-players, respectively, plays.

Current players are much more likely to have parents (especially mothers) and siblings who play. Family or household members outside the immediate family appear to have little importance.

Another important factor distinguishing current from past teen players is the way they first became involved with music.

Fifty-two percent of current players (but only 37% of past players) first became interested in music on their own. Twenty-seven percent of current players' (compared to 20% of past players') parents got them started in instrumental music. Past players are more likely to cite a teacher or "someone else" as first getting them interested.

Therefore, it appears among teens that a strong personal interest in playing a musical instrument is an important aspect of sustained music involvement in addition to musical environment and parental support.

The importance of self-motivation and personal interest in music on the part of the teenager (and secondarily, parental involvement) is underlined by findings regarding instrument choice and motivation to practice. Current players' primary source of motivation to practice is internal; past players' was their parents or music teacher.

Current players also are more likely than past players to have decided on their own what instrument to play. When someone else was involved in the instrument choice, current players are more likely than past to cite parental involvement, while past players more than current players say a music teacher, friend or sibling was involved.

FAMILY MUSIC INVOLVEMENT

	Current Players	Past Players	Non-Players
Someone Else Plays (net)	**63%**	**42%**	**29%**
Mother	30	17	6
Father	11	8	6
Brother/Sister	43	22	15
Other Family/HH Member	6	8	6
No One Else Plays	**37**	**58**	**71**

WHO MADE INSTRUMENT DECISION?

	Current Players	Past Players
Decided myself	66%	56%
Made decision with someone else	29	33
Someone else decided for me	5	10

Who Are The Players And Non-Players?

Current Players: Demographically, current players responding to the survey tend to be female, age 12 to 13, in the eighth grade or lower and live in medium-size (four-person) households.

In addition to music-related pursuits, they tend to participate in a wide variety of other activities as well, being more likely than other teens to be currently involved in clubs or activities related to school subjects or careers and honor societies; reading for pleasure, art, photography and fitness activities; civic and social activities such as church, shopping and going to movies. Of the list of activities surveyed, current players are less likely to be involved in only one—paid employment.

Current players are most likely to play and own electronic keyboards,

THE LEARNING EXPERIENCE

	Current Players	Past Players
Original Motivation		
Became interested on my own	52%	37%
Parents got me started	27	20
Teacher got me interested	5	14
When First Learned to Play		
Before age 5	4%	4%
6–11	79	78
12–14	14	17
15–18	3	1
First Way Learned to Play		
Took band/orchestra at school	36%	34%
Private lessons	28	23
Lessons at school	19	34
Taught self	13	8
Parents/family members taught	10	7
Friend taught	2	5
Ways Ever Learned to Play		
Band/orchestra at school	64%	53%
Taught self	52	36
Private lessons	48	33
Lessons at school	36	46
Parents/family member taught	25	21
Friend taught	20	21
Primary Motivation to Practice/Play		
Self	63%	34%
Music instructor	14	33
Parents	12	23
Other players	3	4
Don't/didn't practice	10	6

pianos and woodwind instruments. Slightly more current players own keyboards, pianos and guitars than play these instruments, perhaps suggesting even among this group there has been some loss of interest in instrumental music.

Almost 90% of current players practice at least once-a-week and nearly 60% once-a-day or more.

Non-Players: Compared to current players, teens who have never learned to play a musical instrument are more likely to be male, older (age 16 or above), in grade 10 or above (especially grade 12 or above), members of either small (less than 4) or large (6 or more) households with slightly lower incomes. They are less likely to be currently involved in a number of school-related, civic and social or special interest activities, perhaps because they are more likely than others to be working after school or on weekends.

Past-Players: Teens who used to play musical instruments tend to fall between current and non-players in terms of demographics and activities. Overall, they are more likely to be female than male and tend to be older than current players. In terms of income, past players are more like current players: Their families are much more likely to have incomes of $50,000 or more than families of non-players.

The majority of past players stopped playing between age 12 and 14. Thirty percent stopped even earlier, between age six and eleven. Fourteen percent stayed with music longer, not stopping until between age 15 to 18. From this it appears the most common time for teens to stop active music participation is during the transition between junior and senior high school.

The Learning Experience

While current and past players tend not to differ in the age at which they first learned to play an instrument, they do differ in their musical training.

Asked how they first learned to play, school band or orchestra was most

often cited by both groups. However, current players were more likely than past players to have first learned via private lessons or self-instruction and less likely by lessons at school.

Current players also appear to have a greater variety of learning experiences. Asked about all the ways they had ever learned to play, current players are more likely than past to cite school band or orchestra, private lessons and self-instruction. Current players also are more likely than past players to have first learned the piano and slightly less likely to have had brass and woodwinds as their first instruments.

Attitudes Toward Music

Teens responding to AMC's survey also were asked to rate their agreement/disagreement with a number of statements probing their attitudes toward music. As expected, current players in general are more likely than past and non-players to agree with positive statements about music. However, past and non-players show surprisingly positive attitudes in some areas.

Majorities of all three groups tend to have positive feelings about music as a worthwhile pursuit, agreeing that: music is an important part of their lives; learning to play an instrument is something you'll always be glad you did; a musical career is a worthwhile pursuit, and that they probably will want their children to play musical instruments.

However, on items probing more active interest in music, all three groups, especially past and non-players, are less likely to express agreement. Only 60% of current players and less than half of past and non-players agree that "music brings the family together." The majority of past and non-players disagree that "everyone should learn to play a musical instrument," and nearly 80% of all three groups disagree that people who play musical instruments are more popular than those who don't.

DEMOGRAPHICS

	Current Players	Past Players	Non-Players
Sex			
Male	41%	46%	55%
Female	59	54	45
Age			
12–13	41%	24%	30%
14–15	30	36	27
16–17	22	27	28
18–19	8	13	15
Grade in School			
Grade 8 or lower	46%	32%	38%
Grade 9	17	18	16
Grade 10–11	22	30	26
Grade 12+	15	20	22
Household Size			
2 to 3 People	27%	31%	34%
4	40	34	30
5	24	22	22
6+	9	13	15
Income			
Under $22,500	21%	21%	29%
$22,500–$34,999	14	13	14
$35,000–$49,999	30	29	31
$50,000+	35	36	25
Region			
New England	5%	5%	5%
Mid-Atlantic	15	15	14
North Central	28	30	25
South	20	19	28
Southwest	14	9	12
Mountain/Pacific	18	21	16

INSTRUMENTS CURRENTLY PLAY / EVER LEARNED TO PLAY

	Current Players (Currently Play)	Past Players (Ever Learned)
Portable keyboard/synthesizer/ electric piano	34%	34%
Woodwind	32	36
Acoustic piano	31	25
Brass	21	26
Guitar	13	14
Percussion	13	17
Stringed instrument (not guitar)	9	13
Home organ	7	14
Other	8	29

AGE WHEN STOPPED PLAYING

	Past Players
Before Age 5	1%
Age 6–11	30
Age 12–14	56
Age 15–18	14

ATTITUDES OF NON-PLAYERS (% Agree)

	Past Players	Non-Players
I wish I'd stuck with music	55%	—%
I felt better about myself when I was involved	32	—
I wish I'd learned to play an instrument	—	56
My parents were disappointed I gave up music/never played an instrument	53	16

Past and non-players show a surprising level of regret for their lack of music involvement; more than half wish they had stayed with music or learned to play an instrument. About one-third of past players agree they "felt better about themselves" when they were involved. And, the vast majority of both groups reject the idea that it's too late to learn to play. Half of past players, but only 16% of non-players, say their parents were disappointed they gave up or never played a musical instrument.

Current, past and non-players are likely to feel instrumental music should be part of schools' regular curricula as opposed to an extra-curricular activity only.

Reasons to Play or Not Play

To help identify important benefits of and barriers to instrumental music participation, the survey asked a series of questions to probe respondents' reasons for playing, no longer playing and for never playing at all. Past and non-players were also asked to identify factors that could make them want to learn or return to an instrument now.

The reasons given most frequently by current and past players for why they play/played were that playing an instrument is fun and provides a sense of personal accomplishment. Current players cited these reasons at much higher levels.

Current players' next most frequently cited reasons for playing are that it's relaxing, a good means of expression and a good hobby. These results further support findings from previous AMC reseach indicating the most compelling benefits of music are personal and internal in nature.

Past players, on the other hand, were more likely than current players to say they played because they wanted to be in a band, their parents thought it was important, their friends played and they thought it was important. Reasons most frequently cited for giving up music echo the lower levels of personal interest and internal motivation to play discussed earlier. Past players are most likely to have quit playing because they lost interest, didn't like practicing or felt playing took too much time.

Non-players, when asked to indicate reasons why they never learned to play, most frequently reported that they never wanted to, other things are more important, they just never thought about it, instruments and equipment are too expensive, their parents never encouraged them, and it takes too much time.

Involvement with Computers

Nearly half of all current players report having access to a computer at home, as do a similar proportion of past players. Among non-players, however, only 38% report having a computer at home. Regardless of whether they have home access to a computer, the vast majority of each group report having used a computer to play games and in school classes. Only a few in each group have not used a computer for either of these purposes.

While only a releatively small number of respondents have used a computer to make music, more than 80% of each group are aware of the computer's music-making capabilities. And, the majority of respondents in all three groups show at least moderate interest in learning to use a computer for this purpose. Not surprisingly, current players show the strongest interest, but substantial minorities of past and non-players are interested as well.

For information about how to order a complete written report on this new attitude study contact: The American Music Conference, 303 E. Wacker Dr., Suite 1214, Chicago, IL 60601 or call (312) 856-8820.

ATTITUDES TOWARD MUSIC-MAKING AND EDUCATION

	Current Players	Past Players	Non-Players
Music As Worthwhile Pursuit (% Agree)			
Learning to play an instrument is something you'll always be glad you did	88%	70%	58%
I'll probably want my kids to play	89	70	54
Music is a very important part of my life	84	68	63
A musical career is a worthwhile pursuit	72	65	65
Music brings the family together	59	47	42
School Music Programs			
Instrumental music should be part of regular curriculum	83%	69%	66%
Music should be extra-curricular activity only	43	49	57
I'd be/am proud to be in school band/orchestra	77	50	42
You don't get enough personal attention in school music programs	49	53	45
There's too much competition in school music programs	33	35	31

WHY PLAY (PLAYED) AN INSTRUMENT

	Current Players	Past Players
It's fun	64%	49%
Provides sense of personal accomplishment	35	24
It's relaxing	25	10
It's a good hobby	25	22
It's a good means of expression	25	10

TEENS AND COMPUTERS

	Current Players	Past Players	Non-Players
Access to Personal Computer			
Family has computer at home	48%	45%	38%
Family doesn't have computer	52	55	62
Computer Used To/In			
Play games	93%	90%	87%
School classes (not music)	76	78	75
Word processing	56	56	45
Graphics/desktop publishing	36	34	25
Record keeping	24	23	22
Make music (not at school)	13	9	6
Music classes at school	7	5	4
None of these	2	3	5

COMPUTERS AND MUSIC-MAKING

	Current Players	Past Players	Non-Players
Computer Music-Making Capability Awareness			
Aware	87%	81%	89%
Not Aware	13	19	11
Interest in Learning to Make Music on Computer			
Extremely/very interested	40%	28%	30%
Somewhat interested	37	40	38
Not very/at all interested	23	32	33

Editor's Note: *The American Music Conference wishes to acknowledge and thank the National Association of Music Merchants (NAMM) for its generous underwriting of this year's new attitude survey.*

The purpose of the Teenagers' Attitude Toward Music survey was to:

- *Probe the attitudes of teenagers (age 12-19) toward music and instrumental music participation.*
- *Examine differences in the backgrounds of current players, past players and non-players to identify factors that may have influenced their decisions to play or not to play.*
- *Identify relevant benefits of, and barriers to instrumental music participation among this audience.*

The study was conducted in two phases. First, using a postcard-type screener, a balanced national sample of 5,000 teenagers age 12 to 19 were separated into three groups: those who currently play a musical instrument, those who used to play but no longer do, and those who have never played an instrument. Three different survey questionnaires then were mailed to some 2,000 respondents who agreed to fill out a longer form; some 1,300 questionnaires (70 percent) were completed and returned. The results highlighted here are based on the responses of these teens.

DIRCTORY OF MUSIC-RELATED ASSOCIATIONS AND ORGANIZATIONS

(Trade, Educator, Religious, Fraternal, Service, and Other)

Please Note: For easier reference, directory listings under each category are alphabetical by key words, i.e., piano, singing, flute, etc.

TRADE

AMERICAN FEDERATION OF MUSICIANS
1501 Broadway Suite 600
New York, NY 10036
(212) 869-1330
Represents professional recording, television, movie, performance, and other musicians.

NATIONAL ASSOCIATION OF BAND INSTRUMENT MANUFACTURERS
℅ G. Leblanc Co.
7019 30th Ave.
Kenosha, WI 53141
(414) 658-1644
Promotes growth of instrumental music, worldwide.

NATIONAL ASSOCIATION OF PROFESSIONAL BAND INSTRUMENT REPAIR TECHNICIANS
8 Ardith Dr.
Normal, IL 61761
(309) 453-4257
Provides forum for exchange of ideas and implements code of professional ethics.

RETAIL SHEET MUSIC DEALERS ASSOCIATION
℅ Senseney Music, Inc.
1407 E. Harry
Wichita, KS 67211
(316) 262-1487
Promotes sheet music dealer/publisher relations; encourages music education, and provides common ground for exchange of ideas.

NATIONAL ASSOCIATION OF SCHOOL MUSIC DEALERS
317 E. Walnut
Springfield, MO 65806
Services the musical needs of schools at all levels.

MUSIC ACHIEVEMENT COUNCIL
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
A joint council of the National Association of Music Merchants and National Association of Band Instrument Manufacturers dedicated to the retention of students in school band and orchestra programs.

MUSIC DISTRIBUTORS ASSOCIATION
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory wholesalers, importers, or manufacturers.

INTERNATIONAL ASSOCIATION OF ELECTRONIC KEYBOARD MANUFACTURERS
℅ Lowell Simpson
Baldwin Piano and Organ Co.
422 Wards Corner Rd.
Loveland, OH 45140-8390
(513) 576-4500
Association for electronic keyboard manufacturers.

CREATIVE AUDIO AND MUSIC ELECTRONICS ORGANIZATION
17 Clara Rd.
Framingham, MA 01701
(617) 877-6459
Represents professional audio and music electronics manufacturers and distributors.

GUITAR & ACCESSORIES MUSIC MARKETING ASSOCIATION
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for fretted instrument and/or related accessory manufacturers, distributors and others.

NATIONAL ASSOCIATION OF MUSIC IMPORTERS & EXPORTERS
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory importers and exporters; publishes import/export statistics, trade show and tariff schedules, and newsletters reporting worldwide government activities affecting international trade.

GUILD OF AMERICAN LUTHIERS
8222 S. Park Ave.
Tacoma, WA 98408
(206) 472-7853
Information exchange network for stringed instrument builders and repairers.

NATIONAL ASSOCIATION OF MUSIC MERCHANTS
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
Represents retailers, manufacturers and distributors of musical instruments, professional audio equipment and related music accessories. Also provides a variety of educational and support services, including management of two annual trade exhibitions.

INTERNATIONAL MIDI ASSOCIATION
5316 W. 57th Street
Los Angeles, CA 90056
(213) 649-6434
International MIDI (Musical Instrument Digital Interface) information network and official distributor of the MIDI 1.0 Detailed Specification.

INTERNATIONAL ASSOCIATION OF PIANO BUILDERS & TECHNICIANS
9140 Ward Parkway
Kansas City, MO 64114
(816) 444-3500
International association for piano technicians.

PIANO MANUFACTURERS ASSOCIATION INTERNATIONAL
4020 McEwen
Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Association representing the acoustic piano industry.

PIANO TECHNICIANS GUILD, INC.
9140 Ward Parkway
Kansas City, MO 64114
(816) 444-3500
Association for technicians specializing in tuning, maintenance, repair and rebuilding of fine pianos. Provides examinations for Registered-Tuner-Technician (RTT).

NATIONAL MUSIC PUBLISHERS ASSOCIATION
205 E. 42nd St.
New York, NY 10017
(212) 370-5330
Association representing the music publishing industry.

EDUCATOR/SCHOOLS

ASSOCIATION OF COLLEGE, UNIVERSITY AND COMMUNITY ARTS ADMINISTRATORS, INC.
1112 16th St., NW (#620)
Washington, DC 20036
(202) 833-2787
Professional association/service organization for performing arts presenting organizations.

COLLEGE BAND DIRECTORS NATIONAL ASSOCIATION
Box 8028
University of Texas
Austin, TX 78713
(512) 471-5883
Supports and promotes growth of member musicians, educators, conductors and administrators.

AMERICAN SCHOOL BAND DIRECTORS ASSOCIATION
P.O. Box 146
Otsego, MI 49078
(616) 694-2092
Promotes the advancement and improvement of elementary and secondary school instrumental music instruction.

AMERICAN COLLEGE OF MUSICIANS
808 Rio Grande
Austin, TX 78767
(512) 478-5775
Promotes music education with established standardized curriculum for piano teachers and students.

COLLEGE MUSIC SOCIETY
1444 15th St.
Boulder, CO 80302
(303) 449-1611
Organization for college music teachers which gathers and disseminates information and ideas on music in higher education.

NATIONAL ASSOCIATION OF COLLEGE WIND & PERCUSSION INSTRUCTORS
Division of Fine Arts
Northeast Missouri State University
Kirksville, MO 63501
Provides communications forum for college, university and conservatory wind and percussion teachers.

MUSIC EDUCATORS NATIONAL CONFERENCE
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Dedicated to helping individual music educators cope with complexities of changing responsibilities.

MUSIC INDUSTRY CONFERENCE
℅ MENC
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Auxiliary organization of the Music Educators National Conference which serves the mutual interests of the industry and educators through exchange of ideas, development of code of ethics, and maintenance of the highest level of business procedures at conventions and in advertising and all relations with the public.

ORGANIZATION OF AMERICAN KODALY EDUCATORS
Music Department, Nicholls State University
Box 2017
Thibodaux, LA 70310
(504) 448-4602
Organization for public and private teachers, students, administrators and others who support the Kodaly teaching method.

NATIONAL GUILD OF COMMUNITY MUSIC SCHOOLS
40 N. Van Brunt St., Suite 32
Englewood, NJ 07631
(201) 871-3337
Association of nonprofit, nondegree community schools of the arts that offer instruction to people of all ages and ability.

NATIONAL SCHOOL ORCHESTRA ASSOCIATION
345 Maxwell Dr.
Pittsburgh, PA 15236
(412) 882-6696
Supports elementary, junior and senior high school and university instrumental music teachers dedicated to development of school orchestra programs.

COUNCIL FOR RESEARCH IN MUSIC EDUCATION
1205 W. California
Urbana, IL 61801
(217) 333-1027
Organization for scholars and institutions interested in advancing the cause of research in music teaching and learning.

NATIONAL ASSOCIATION OF SCHOOLS OF MUSIC
11250 Roger Bacon Dr., Suite 21
Reston, VA 22090
(703) 437-0700
Provides accreditation, statistical services, policy analysis and administrative development for programs preparing professional musicians, teachers and music services personnel.

NATIONAL COUNCIL OF STATE SUPERVISORS OF MUSIC
Virginia Department of Education, Box 6Q
Richmond, VA 23216
(804) 225-2059
Advisory body to the National Association of Music Educators' National Executive Board with membership open to anyone responsible for music in a state or territory department of education and a member of MENC. Goal is to develop and strengthen music education in the U.S. and its territories.

AMERICAN STRING TEACHERS ASSOCIATION
UGA Station Box 2066
Athens, GA 30612-0066
(404) 542-2741
Promotes and encourages professional and amateur string (including guitar and harp) and orchestra study, performance, teacher education, research and pedagogy.

SUZUKI ASSOCIATION OF THE AMERICAS
P.O. Box 354
Muscatine, IA 52761-0354
(319) 263-3071
Organization of teachers, parents and educators interested in and dedicated to advancement of the Suzuki Method in the western hemisphere.

MUSIC TEACHERS NATIONAL ASSOCIATION
617 Vine St., Suite 1432
Cincinnati, OH 45202-2434
(513) 421-1420
Organization serving music teachers in studios, conservatories, music schools, public and private schools and institutions of higher learning.

WOMEN BAND DIRECTORS NATIONAL ASSOCIATION
344 Overlook Dr.
West Lafayette, IN 47906
(317) 463-1738
Provides encouragement for young women entering the instrumental music field and develops comprehensive music and education programs beneficial to women band directors and their students.

RELIGIOUS

NATIONAL CATHOLIC BANDMASTERS ASSOCIATION
Box 1023
Notre Dame, IN 46556
(219) 239-7136
Organization representing Catholic school instrumental music teachers which promotes qualitative and quantitative growth of Catholic school band programs, with special emphasis on solutions to the unique and specific concerns encountered in parochial schools.

CHRISTIAN INSTRUMENTAL DIRECTORS ASSOCIATION
P.O. Box 907
Pentwater, MI 49449
(616) 869-5085
Designed to meet the needs of private, church-related school band and/or orchestra directors and church music directors interested in using instruments in worship.

STANDING COMMISSION ON CHURCH MUSIC OF THE EPISCOPAL CHURCH
815 Second Ave.
New York, NY 10017
(212) 867-8400
Undertakes research and development of musical resources (e.g. hymnals), guidelines and educational materials for Episcopal liturgical music.

PRESBYTERIAN ASSOCIATION OF MUSICIANS
1000 E. Morehead St.
Charlotte, NC 28204
(No Telephone)
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